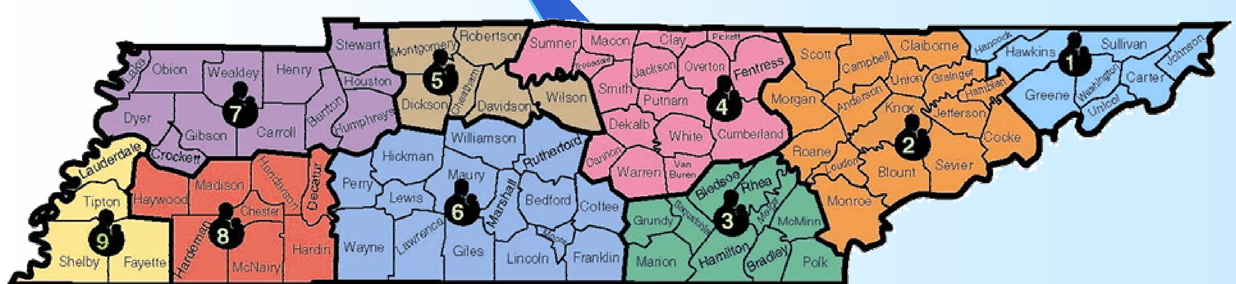
Partners on a Journey of Hope

Tennessee's Early Intervention Service Coordination Training



Roadmap for the Journey

The Trainer's Guide

Module 6

Description of Module 6

Getting to Know the Travelers along the Way
Gathering Information, Intake & Referral, and Building Resources

First contacts with families can set the tone for future relationships between the family and early intervention system service providers. Families must be given the information, support, and opportunity to fulfill their role as full decision-making partners in the early intervention process. This will be evidenced by professionals who demonstrate cultural sensitivity in their relationship with families, professionals who demonstrate flexibility, acknowledging that families have unique needs, professionals who seek to involve families as key decision makers throughout the early intervention process, and professionals willing to collaborate across agency lines for the benefit of the child and family (Addison, S. and Mattheiss, L., 2004). Putting these ideas into practice starts with the initial contact with the family.

This training module is comprised of three parts: (1) Gathering Information, (2) Intake & Referral, and (3) Building Resources. Basic adult learning principles are included in an effort to help service coordinators present information to families in ways that will enhance their understanding. Through pre- and post-tests, case examples, role-playing, and other activities, the participant(s) will learn how to gather information in ways that are comfortable and appropriate for families.

Landmarks of the early intervention process are included so service coordinators will be able to accurately inform families of how the system operates. Participants will practice explaining the early intervention system to families using an intake tool and will review forms related to intake and referral.

Participants will complete several outside assignments for this module. An intake field observation will be done, and visits to several key service providers will be completed in order to help the service coordinator learn more about resources available to children and families. Participants will complete an internet research assignment in order to familiarize themselves with prominent state and federal resources as well.

Partners on a Journey of Hope

Tennessee's Early Intervention Service Coordination Training

Module 6

Getting to Know the Travelers along the Way
Gathering Information, Intake & Referral, and Building Resources

Competencies

- Has knowledge and understanding of principles of adult learning that affect family members as they receive information about the early intervention system.
- Takes into account and respects the various commitments of family members in planning intervention.
- Has the ability to initiate and maintain effective and systematic consultation (communication) with family members and caregivers in a sensitive manner.
- Has knowledge and understanding of how to disseminate information concerning the options for intervention, including financial assistance, to families and other professionals in the community.
- Consults with and refers to other professionals and community agencies.
- Facilitates the movement of all appropriate clients into the intake and screening process.
- Disseminates information throughout the community regarding the availability of services, criteria for eligibility, and methods of referral.
- Demonstrates skill in identifying gaps and overlaps in services provided to children and their families.
- Is willing to act as a representative of TEIS at a variety of community and regional events that include child find and public awareness activities.
- Participates in, conducts, and implements screening and child find programs.
- Exercises procedural safeguards as described in Part C of IDEA.
- Coordinates services to assure that all evaluations and provision of services are performed in a timely manner.
- Demonstrates knowledge and skill in conducting family-directed assessments to determine resources, priorities and concerns of the family and identification of the supports and services necessary to enhance the family’s capacity to meet the developmental needs of their infant or toddler.
- Is familiar with resources in the area, and has the ability to assist families in the utilization of community, state, and federal resources to advocate for new or needed services.

Module 6

Getting to Know the Travelers along the Way
Gathering Information, Intake & Referral, and Building Resources

Contents

Module 6

Getting to Know the Travelers along the Way
Gathering Information, Intake & Referral, and Building Resources

Module Instructions

Procedure/Activity	Materials	Time
Introduce the module by describing its contents. You may use the written description provided at the beginning of this guide if desired. Note that the contents of this module are divided into three components: (1) Gathering Information (6.1-6.6) (2) Intake & Referral (6.7-6.14) (3) Building Resources (6.15-6.18)	Module description	5 minutes
6.1 Gathering Information Show PowerPoint *Gathering Information* (slides 1-13), making the points and engaging the learner in discussion as desired and time allows.	PowerPoint *Gathering Information* (disc, web, or Blackboard) Computer with monitor or laptop or projector for viewing PowerPoint Print and provide handout of PowerPoint, if desired	15 minutes
6.2 The Routines-Based Interview **Please Read** The routines-based interview is a powerful component in the process of intervention planning. If your district/agency chooses to incorporate this model into practice, the **trainer will complete the three activities presented here during formal training with the learner(s)**. Since this will add significant additional time necessary to complete this module, the trainer may choose to complete these		To be done as a separate training for coordinators who will be conducting routines-based interviews, or as an independent outside assignment. 10 minutes to make

Procedure/Activity	Materials	Time
activities at a separate training date and time. The trainer is further cautioned that there are associated practices tied to the routines-based interview, such as the Eco-map, which are not included in this brief activity. To ensure full understanding of this model, please consider the following: **Training and technical assistance** For keynote presentations, conference sessions, workshops, or site-specific technical assistance, contact Robin McWilliam: Robin.McWilliam@Vanderbilt.edu In addition to Dr. McWilliam, an international network of colleagues, former students and staff, trainers, faculty, and program directors that have experience with Dr. McWilliam's model are available. **Service coordinators benefit from learning about the routines-based interview. All participants should complete the following activities independently outside of formal training time for this module if they are not included in formal training as described above.** **Step 1** Review the content from the article, *Functional Intervention Planning: The Routines-Based Interview* (6.2a). **Step 2** View the video to observe Dr.	Article *Functional Intervention Planning: The Routines-Based Interview* (6.2a) TV VCR	outside assignment if needed.

Procedure/Activity	Materials	Time
Robin McWilliam as he demonstrates this activity. Video — *Routines-Based Interview* (RBI) 45-minute video example of an interview for developing an IFSP with a family ($20.00) There are two ways to order materials: 1. Print the page from the website below, check materials desired, and fax the page to Sheila Allison, Assistant to the Director (615-936-0256) 2. E-mail Sheila.Allison@Vanderbilt.edu, listing the materials desired. You may list them by product number. 3. Visit the following website for a complete listing of Dr. McWilliam's materials: http://www.vanderbiltchildrens.com/interior.php?mid=983 **Step 3** Review 6.2b *Routines-Based Interview Form*. Place the above article and form in the portfolio guide after review. If this step is completed during formal training, role-play with the participant a brief interview, using the interview form for recording information, and place in portfolio.	Video *Routines-Based Interview* (RBI) by Robin McWilliam Early Childhood Institute Vail, Colorado 6.2b *Routines-Based Interview Form*	

Procedure/Activity	Materials	Time
6.3 Gathering Information Pre-Quiz Advise the participant(s) to complete the pre-quiz. Collect them upon completion, and return to PowerPoint.	*Pre-Quiz* 6.3 *Pre-Quiz Answer Sheet* 6.3a	5 minutes
6.4 Case example — Jack Show PowerPoint *Gathering Information* (slides 14-16), reading the case example aloud. Instruct participants to develop a list of questions that might be used during the conversation with Susan and Gayle at the initial meeting. Provide a copy of worksheet 6.4a for recording questions. Instruct the participant(s) to place the completed worksheet in their portfolio following training. Show PowerPoint *Gathering Information* (slides 17-24). Make this activity interactive by assigning participants to read the slides in the roles of the interviewer, Susan (mother of Jack), and Gayle (grandmother of Jack).	PowerPoint *Gathering Information* *Case Example—Jack* worksheet 6.4a PowerPoint *Gathering Information*	30 minutes
6.5 Ask Mrs. Yonkers Using PowerPoint *Gathering Information* (slides 25-28), read the questions posed and briefly allow the learner(s) to indicate whether they feel the question is important to ask Mrs. Yonkers. After the participant(s) make their decision, go to slides 29-38 to find out what Mrs. Yonkers thinks.	PowerPoint *Gathering Information*	20 minutes

Procedure/Activity	Materials	Time
6.6 Gathering Information Post-Quiz Advise the participant(s) to complete the post-quiz. Have them compare their results to their own pre-quiz, and file in their portfolio.	6.6a *Gathering Information Post-Quiz*	5 minutes Total time thus far = 1 ½ hrs.
Break		15 minutes
6.7 Intake & Referral Pre-Test Instruct the participant(s) to complete the pre-test. This is a somewhat technical subject with esoteric timelines. Those who are new to service coordination will find this difficult. Encourage them to do their best, knowing that there will be procedural items that they are unfamiliar with at this point. They will be given the opportunity to find the answers using Rulemaking Hearing Rules of the State Board of Education later in this module. Completing the pre-test will help the learner be more aware of this content as it is being presented in the training. Handout 6.7a provides the answer key for the trainer to be used when the *More Rules for the Road Post-Test* (6.14) is done.	6.7 *Intake & Referral Pre-Test* 6.7a *Intake & Referral Trainer's Answer Key Pre-Test/Post-Test More Rules for the Road*	15 minutes
6.8 Intake & Referral Show PowerPoint *Intake and Referral* (slides 1-17), making the points and engaging the learner in discussion as desired and time allows. Plan to move through these slides quickly, as the landmark topics (IFSP, transition, evaluation & assessment, etc.) will be	PowerPoint *Intake & Referral* (disc, web, or Blackboard) Computer with monitor or laptop or projector for viewing PowerPoint Print and provide handout of PowerPoint, if desired	15 minutes

Procedure/Activity	Materials	Time
presented fully in a module dedicated to those specific items. The overview is included here to introduce the learner to the early intervention process, and will be reinforced in future modules.		
6.9 Tennessee's Early Intervention System **Note about the use of the flipchart:** **Prior to training, print** (in color if possible) a copy of 6.9a Intake Flipchart. It is recommended that all service coordinators use this item during actual intakes with families in order to help explain the early intervention system. It is further recommended that each service coordinator have his/her own copy enclosed in sheet protectors and placed in a notebook to carry to the intake. It has proven helpful to keep an extra copy in each state vehicle being used by service coordinators as a backup. Use of the intake flipchart is an effort to promote consistency in the information families receive at the time of intake. This does not negate recommended practices concerning working with families using an individualized, family-centered approach that is respectful of individual family cultures. The service coordinator will need to exercise judgment about how much information needs to be shared with a family, based on the situation and the family itself. In any case, the text should not be	6.9a Copy/copies of *Tennessee's Early Intervention* intake flipchart	30 minutes

Procedure/Activity	Materials	Time
read to families, but should be available as a prompt to service coordinators about topics to be covered, and as a visual aide for families receiving this information. Slide 11 of the flipchart can be printed and placed in an intake packet for families if desired. **(Additional text is available on the notes pages of the flipchart PowerPoint.)** **Instructions for training:** For purposes of this training activity, instruct participants to work in pairs. Have one person play the role of the family member and the other play the role of the service coordinator. Practice presenting the information as you would to a family. Switch roles if time allows. The trainer should listen in on each participant and assist as needed. (Note: If there is only one participant, the trainer can assume the second role.)		
Break		15 minutes
6.10 Intake Checklists Outside reading assignment and task Provide a copy of the three checklists for the participants. Instruct them to read the information outside of training, and follow-up with the trainer if they have questions about these procedures. If procedures in the trainer's district/agency differ from these, inform the participants of those differences. Instruct the participant to place	*6.10a Before Intake Checklist* *6.10b At Intake Checklist* *6.10c After Intake Checklist*	5 minutes to provide copies and make assignment

Procedure/Activity	Materials	Time
these checklists in a notebook to be used for quick reference as long as needed.		
6.11 Form Review Provide a copy of each form including the instructions on the back of forms where available. Review how and when the forms are used with the participant(s). (Copies of these forms are also available in Chapter 10 of *Tennessee's Early Intervention System (TEIS) Individualized Family Service Plan Manual*.) Service coordinators may find it helpful if state cars are stocked with an expandable file folder containing forms that are likely to be needed in the field. These files can be maintained by a service coordinator or a member of the support staff, and are a welcome backup when needed.	6.11a *Consent for Evaluation* 6.11b *Eligibility Documentation* 6.11c *Professional Verification of Current Diagnosis* 6.11d *Review of Pertinent Records* 6.11e *Family Assessment Summary* 6.11f *Local Education Agency Notification* 6.11g *Minimal Data* 6.11h *Central Intake* 6.11i *Informing & Consent for Early Intervention Services* 6.11j *Authorization for Procurement and Release of Information* 6.11k *Written Prior Notice* (reviewed in Module 4)	1 hour
6.12 Intake Field Observation Assist participant(s) as needed in arranging a time to accompany an experienced service coordinator on an intake visit. Instruct the participant(s) to complete the observation form (6.12), share the results with the trainer for discussion and feedback, and place the form in the portfolio.	6.12 *Intake Field Observation Form*	5 minutes to make assignment
6.13 TEIS Overview	PowerPoint *Imagine – TEIS*	5 minutes to

Procedure/Activity	Materials	Time
Inform participant(s) that the TEIS overview presentation is an optional tool that is available for use during child find and public awareness activities. If this tool is used in your district/agency, the participants will want to familiarize themselves with it at a later time. It is important to look at the note pages with the PowerPoint for suggested dialogue.	*Overview*	inform participants of the availability of this PowerPoint
6.14 More Rules for the Road Intake & Referral Post-Test Instruct participants to complete the post-test. This is another opportunity for the learner to familiarize themselves with the Rulemaking Hearing Rules of the State Board of Education Chapter 0520-1-10 Tennessee's Early Intervention System. When completed, share answers with them using the trainer's key (6.7a) as a guide.	6.14 *More Rules for the Road Post-Test* Copy of *Rulemaking Hearing Rules of the State Board of Education Chapter 0520-1-10 Tennessee's Early Intervention System* 6.7a *Intake & Referral Trainer's Answer Key Pre-Test/ Post-Test More Rules for the Road*	15 minutes
6.15 Building Resources Show PowerPoint *Building Resources* (slides 1-5), making the points and engaging the learner in discussion as desired and time allows.	PowerPoint *Building Resources*, (disc, web, or Blackboard) Computer with monitor or laptop or projector for viewing PowerPoint Print and provide handout of PowerPoint, if desired.	5 minutes
6.16 Building Resources Web Assignment It is essential that service coordinators know how to access information and resources of use to families. This assignment will take time to do the appropriate research. It should be done	6.16a *Building Resources Web Assignment* 6.16b *Building Resources Trainer's Key*	5 minutes to make out-of-class assignment

Procedure/Activity	Materials	Time
outside of formal training time. Advise participants to do the following: 1. Visit the websites on the assignment sheet and become familiar with the listed state and federal programs. 2. Build a resource guide from the above websites that they can refer to in their work. The participant will list each program including the name, address, web address, phone number, contact person, and a very brief program summary or description. Recommend the use of the *TEIS Directory of Services* in gathering local contact information, where appropriate. 3. Advise the participant to place the information in a folder/notebook (or on index cards in a file box), and give to the trainer/supervisor for their approval. 4. Place a copy of this information in the portfolio. (If the participant chooses to keep this information on index cards, a statement of satisfactory completion of this activity can be written by the trainer/supervisor and placed in the portfolio.)		
6.17 Building Resources in Everyday Routines, Settings, and Activities Instruct the participants to	6.17 *Building Resources in Everyday Routines, Settings, and Activities* worksheet	5 minutes to make assignment

Procedure/Activity	Materials	Time
complete the following **outside assignment:** Identify ten **specific** typical settings in the local area that promote the development and success of infants and toddlers. Advise the participant(s) that if they are new to the area, they might need to talk to other service coordinators or families in order to learn what is available in the counties they serve. If they are serving multiple counties, ask them to try to include examples from each county if possible. Upon completion, review their responses, and place a copy in their portfolio.		
6.18 Building Local Resources Brochures & Observations Prior to this training activity, solicit copies of brochures from service providers in your area. (TEIS support staff who work with district contracts or the central directory may be able to help in requesting a supply of brochures for TEIS offices, if these are not already available.) Those individuals/agencies that contract to provide services for TEIS in your area should be targeted, because service coordinators will need to become familiar with those providers. In order to help new service coordinators learn about local resources: 1. Provide a copy of the *TEIS Directory of Services* for the participant's use and review. 2. Assemble copies of brochures,	Local *TEIS Directory of Services* (central directory) Local service provider brochures One *Service Provider Information – Observation* form (6.18a) for each service provider interviewed/observed	15 minutes to explain assignment

Procedure/Activity	Materials	Time
and instruct the participant(s) to carefully read each one as an outside assignment. 3. If time allows, you or an experienced service coordinator can arrange to review agency brochures with the participants, discussing any interagency agreements, policies, history, etc. about working with the provider represented in the brochure. 4. Instruct participant(s) to arrange to meet with and/or observe 3-5 key providers of services to children and families in your area completing one *Service Provider Information-Observation* form (6.18a) for each provider. Shadowing experienced coordinators on visits is one good way to meet providers and to begin to establish rapport with them. The trainer/supervisor will determine the exact number and choice of providers that will be most useful to the new service coordinator, and will provide contact information to the coordinator to facilitate scheduling these observations. Following the observation, the participant will schedule a time to discuss the observations with the trainer/supervisor or their designee (other experienced service coordinator). The purpose of these meetings is for the new coordinator to		

Procedure/Activity	Materials	Time
learn about the program by talking directly to those administering it, and/or by direct observation. For example, a new service coordinator might meet with a teacher from a DMRS program and observe children in a classroom setting, or the new coordinator might meet with a TIPS regional lead teacher to learn about their program, and then accompany a parent advisor on one home visit. Obviously, families would need to be informed and give their approval before any such observation occurred.		Total estimated time=5 hrs., including two 15-minute breaks

Partners on a Journey of Hope

Tennessee's Early Intervention Service Coordination Training

Module 6

Getting to Know the Travelers along the Way
Gathering Information, Intake & Referral, and Building Resources

Bibliography and Resources

Addison, S. and Mattheiss, L. (January, 2004). Early Intervention Matters: Family-Centered Philosophy and the Role of the Family in Early Intervention. Exceptional Parent Magazine. Psy-Ed Corp., River Edge, New Jersey.

Bruder, M.B. & Dunst, D.J. (1999). Expanding Learning Opportunities for Infants and Toddlers in Natural Environments: A Chance to Reconceptualize Early Intervention. Zero to Three, December 1999/January 2000, 34-36.

Dell, P. and Edelman, L. Colorado Core Service Coordination Training. [Online]. Available: http://www.cde.state.co.us/earlychildhoodconnections/scct.htm [Retrieved: 2004, April 20].

Lieb, S. (1991, Fall). Principles of Adult Learning. VISION. [Online]. Available: http://honolulu.hawaii.edu/intranet/committees/FacDevCom/guidebk/teachtip/adults-2.htm [Retrieved: 2004, June 1].

Lowenthal, B. (1993). The Family Interview: A Technique of Early Childhood Assessment. Infant-Toddler Intervention, 3(2), 101-108.

McWilliam, R.A., & Scott, S. (2001). A Support Approach to Early Intervention: A Three-Part Framework. Infants & Young Children, 13(4), 55-56.

Pennsylvania Pathways. (2001). Adult Learning Principles-Putting it to Practice. Pennsylvania Department of Public Welfare, Bureau of Child Day Care Services and administered by Keystone University Research Corporation. [Online]. Available: http://www.papathways.org/PDFs/AdLearnPrinPut2Prac.pdf [Retrieved: 2004, June 1].

Quote DB. [Online]. Available: http://www.quotedb.com/quotes/1748 [Retrieved: 2004, June 9].

Rush, D. and Shelden, M. (2001). Coaching in Natural Environments. Gathering Information. Orelena Hawks Puckett Institute. [Online]. Available: http://www.coachinginearlychildhood.org/webmodules/gatherinfo/gatheringinfo.php [Retrieved: 2004, June 1].

Tennessee Department of Education. (2001). Rulemaking Hearing Rules of the State Board of Education Chapter 0520-1-10 Tennessee's Early Intervention System. Tennessee Technological University Printing Services.

Tennessee's Early Intervention System (TEIS) Individualized Family Service Plan Manual. (2000). Chapter 8, Glossary. Tennessee Department of Education. Nashville.

Tennessee Family Pathfinder. [Online]. Available: http://kc.vanderbilt.edu/kennedy/pathfinder/famsup3a.html [Retrieved: 2004, June 10].